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AUTHOR Esp, D. G.
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ABSTRACT

Observations of the Swedish program for training headteachers were made during a three-week visit in 1980. About 600 school leaders a year have been trained in the compulsory program since 1976. The National Board of Education, the central administrative board under the Ministry of Education, is responsible for the school leader education program and for its budget. Recruitment of headmasters is difficult, partly because the job is complex and involves pressures from different groups. In selecting headmasters, emphasis is placed on teaching experience. Responsibility for appointing headmasters rests with teams composed of inspectors of county school boards, local chief education officers, other headmasters, and teachers. Teamwork is the hallmark of the training, and the starting point of the program is an analysis of actual school problems and of action programs to solve these problems. The course is designed to provide an opportunity to gain experience in implementing and developing programs. The training program consists of residential course periods, home periods, and practical, society-oriented periods. Participants are encouraged to consider the working process in their school and their role within it as school leader. The training courses are provided by eight regional teams composed of acting headmasters and county inspectors or educational psychologists. A comprehensive description is given in this report of a typical course run by one team, and an overview and evaluation is given of the activities of three other teams. (JD)

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REPORT ON THE SELECTION AND TRAINING OF HEADTEACHERS IN SWEDEN

The report describes the school leader education programme in Sweden. It is the result of a three-week visit made in April/May 1980. Also included are some comments on the team training programme and on school leader recruitment and selection.

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First Deputy Chief Education Officer (Schools)
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GENERAL

Sweden has a population of 8 million. Education is compulsory from age 7-16 and the grundskola (comprehensive) spans these ages. About 70% of the 16+ age group go to the gymnasium (upper secondary school) which integrates twenty-two 2, 3 or 4 year lines of study with about 450 specialised courses of varying duration, specialities and goals. Each of the 278 municipalities (kommuner) in Sweden has a local school board. In 1962 the 9-year comprehensive school (grundskolan) was established, and in 1971 the upper secondary schools were reorganised, integrating the theoretical gymnasium, vocational school and continuation school.

The National Board of Education is a central administrative board under the Ministry of Education, publishing general instructions and generally controlling the work of 24 county boards of education. These have had an inspection role, but their emphasis is now changing from control to a greater emphasis on stimulation of developments. The kommuner control the schools and are responsible for premises and equipment.

Within the communities schools are organised in headmaster areas. A head can therefore be responsible for classes based at several school sites.

In-service education of teachers is centred in 6 regions and based in the same cities as the six larger teacher training colleges. Initial teacher training is administered by a separate national board for higher education.

Teachers' unions are organised on the basis of pre-comprehensive reorganisation, there being one union for teachers of classes 1-6 in the grundskolan, and one for teachers in the gymnasieskola. Some of the teachers of classes 7-9 in the grundskolan are organised in the same union as the teachers of the gymnasieskolan; some belong to other unions. There is also a union for vocational teachers. The school leaders' union (SFL) has heads and deputies from grundskolan, gymnasieskolan, the central unemployment agency, adult education, further education, etc.

The work of the SIA Commission on the inner workings of the school resulted in a major bill in 1976. The aims were to change the daily work methods of schools, introduce a new school day which integrated community and school activities, increasing local decision-making giving more local freedom to use state funds, increasing co-operation between school and society and spreading 'democratisation'. There is currently another commission reviewing the work of the upper secondary schools.

Currently there is a commission studying the organisation of the state governmental administration of education. It is likely that changes will be made which will devolve more responsibility from National Board of Education level to the local authorities. The new system will be enforced from 1 July 1982.

General Background to Teacher In-Service Training in Sweden

The main sources of in-service training and education for teachers and school personnel in comprehensive schools (grundskola) and upper secondary schools are:

(a) Five days of compulsory IST each year

These study days are run by the local kommun - the pattern of provision varies. This training is planned in co-operation with the county (Lån) board of education.

(b) The National Board of Education runs about 100 courses a year via INSET departments at 6 colleges which form the basis of the 6 INSET regions.

(c) Since 1976, as part of the SIA reform, there has been:

(i) The Team Training Project (PLAG). This brings together 10-15 people from grundskola in a headmaster area and involves the head, teachers, non-teaching staff and school psychologists. These people pursue a 10-day course over a year and also do some school-based work;

(ii) The School Leader Programme (SLUG) - is compulsory for heads and deputies in grundskola and gymnasieskola. This is a 2-year programme incorporating 25 residential days, home periods and society-orientated practice. The emphasis is on development of work in your own school.

HISTORY OF SCHOOL LEADER TRAINING IN SWEDEN

Until the mid-1960s very little leader training was done - some 2-week courses were run by the Swedish Association of Local Authorities, the teachers' associations and the association of headteachers. By 1969/70 there were some 3-week courses providing 2 weeks of residential training in the Spring and a further residential week at the end of the year.

In the intervening period heads completed a home project which was half-academic, half-practical. The course was based on administrative skills. During the late 1960s school leaders and teachers were pressing for more concerted action. The 'PLUS' Commission was established in 1972 to consider the problem of school leader training. This Commission was set up by the National Board of Education and included a number of people who had pioneered developments in schools, and also university people involved in school-based research projects which were analysing various aspects of school life, and organisational development in schools. The very large Commission also included 3 psychologists, 3 economists and numerous heads and deputy heads. The 'PLUS' Commission considered the contribution that might be made by commercial management training centres, but it was decided that the pattern and methodology of commercial training courses did not meet the education needs of experienced professionals in schools, nor did they provide proper transfer of benefits from the training course to the school or for proper follow-up. The outcome of these discussions was clearly influenced by key members of the 'PLUS' Commission who had an interest in real educational change. By 1974/5 the 'PLUS' Commission had devised a central curriculum for a basic course for school leaders. Twelve separate sub-committees had each prepared details for a specific area of training. The problem was that the total course was to be 25 days, yet each sub-committee had recommended requirements which more than overflowed the time constraint. By the Spring of 1975 a revised programme was approved by the Board of Education. Contrary to usual Swedish Commission practice, this was not sent back to all interested parties for comment. This is because teachers' organisation, politicians and others had all been adequately represented on the Commission.

Simultaneously the SIA Commission on the inner working of the school was set up by the government. The Secretary of this had an administrative concept of school leader training and there was an 'underground' debate between the SIA Commission and 'PLUS' Commission. The Spring of 1976 saw Bill 39 endorsing the SIA proposals and incorporating as an integral part of implementation the school leader and team training programmes. The twelve elements of the school leader training syllabus were as follows:

School and environment

- the individual perspective
- the educational process
- society and the school
- democratic leadership

The school-frames and resources

- human resources
- aims
- the frame: money, laws, organisation and the physical environment
- synthesis - administrative leadership

The school and its development

- philosophies of development
- principles - eg communications, decision-making
- education process and teachers - the process of analysis and the process of implementation
- synthesis: educational leadership

This original syllabus has since been modified in the light of experience, but it was perhaps necessary in the transition from administrative training to a training based on school development. 'PLUS' programme aims have had good political support from 'Left' and 'Right'. Bill 39 of 1976 stated that "This education aims at a deepening knowledge of the aims of the school - courses provided for school leaders should be meaningful for reaching these aims - the school leader needs to deepen his knowledge of himself and of relationships between people. School leaders need to develop ways to act and to develop the organisation and the work in every school. Every participant must take part in the design and implementation of the education programme and thinking about the training functions".

Participants are, therefore, encouraged to work with their staff on a co-operative basis - the purpose initially is to undertake a critical analysis of the school with the help of the staff and pupils. This home-based work is the BASIS for the training. The course is need-based - aiming resources at school needs. Team work is again a hallmark of the training and the starting point of the programme is an analysis of real problems leading to action programmes and an opportunity to gain experience of implementing development.

I was interested to see how the high ideals are being achieved, particularly as the training is compulsory.

ORGANISATION OF THE SCHOOL LEADER PROGRAMME

The National Board of Education is responsible for the school leader education programme and its budget. A steering committee is composed of representatives of the association of local kommuns (kommunförbundet) teacher unions and school inspectors of the county school boards and the in-service department at Linköping.

There is a permanent full-time director group in Linköping, which has, among other things, direct responsibility for working with the regional educational teams. This group is also engaged on evaluation and research activities. The director group have, from the outset, provided a thorough documentation of the programme which began in 1976 and is due to be concluded in 1985. There have been four reports in the English language with various aspects of the scheme:

Report No 1: "School Leader Education in Sweden", Ekholm, August 1977
Report No 2: "The Role of the School Leader", Stegö, June 1978
Report No 3: "Research in Education - does it matter?" Ekholm, Oct 1979
Report No 4: "Training School Leaders in Sweden", Stegö, April 1979

The training courses are provided by 8 regional teams (two teams are further divided into two sub-regions). Each team has a full-time co-ordinator - usually a county inspector or headteacher on secondment - and other team members are seconded to the work part-time. Most team members are heads, county inspectors or educational psychologists.

PARTICIPANTS

This is a compulsory training programme for all school leaders (heads and deputy heads) from all categories of school, including grundskola, upper secondary schools. School directors of kommuns and local politicians are also invited to participate. Where possible, it is intended that all school leaders in a kommun will participate simultaneously in this course. About 600 school leaders have been trained in each year since the start of the programme in 1976. To date some 400 of the 1,200 headmaster districts and half the 4,500 school leaders in Sweden have taken part in the programme.

Although the programme is compulsory, some people over 60 were originally allowed to opt out. Only a few people have been exempted, generally on grounds of ill-health.

THE SCHOOL LEADER EDUCATION PROGRAMME

The programme comprises residential course periods, home periods and practical, society-orientated experience.

The course programme lasts for 25 days spread over a period of two years (four semesters) and divided into eight residential periods of 3/5 days. During these residential periods the participants prepare work which will be done during home periods and gain a deeper understanding of the school and its working methods. The aims of the programme are development of the activities of the school unit, development of the role of the school leader and the personal development of the individual participant.

During the course participants are encouraged to consider the working process in their school and their role within it as school leader.

The aim of the school leader training programme is to utilise the experience of school leaders.

"The point of departure should be real problems connected to the participant's own experience and work situation." (Eckholm)

THE REGIONAL PATTERN

During the residential periods when the whole course (seldom more than 30 people) comes together, which is undertaken in small groups and school leaders with differing experiences are deliberately put together for most of the group work throughout the course.

The work during the home periods leaves the initiative with each school leader and his colleagues at school, although it is intended that the trainer will help the trainee.

Most of this work during the home periods is primarily observation of the working process at the school, and attempts to initiate developmental work at that level. The course is 2 years long because the organisers recognise the period of time required to nurture developments in a school. The trainers require the participants to set their own requirements, but they endeavour to discuss the individual school's development with each school leader in his own specific circumstances. The school leaders will also be encouraged to work in study circles in the kommun, but the degree to which this happens depends on the active participation and interest of the local school director and local politicans. It must be noted that 1/10th of the school leader's time is formally allocated to this work;

indeed, the cost of paying substitutes for a further 37.5 days equivalent and providing substitutes for 4 weeks of society-orientated practice means that substitution is being provided for 82.5 full days per participant (equivalent to the cost of a 3-month commercial residential management course in England!).

Four weeks of society-orientated practice was added by Parliament to the original 'PLUS' Commission's proposals. School leaders spend 2 weeks with social and education agencies and 2 weeks in industry or commerce.

This society-based training was not asked for by the 'PLUS' Commission. The trade unions supported the idea, however, and contrary to expectations, teachers' associations supported it.

The response of participants to this element of the course has been encouraging. In the first year (1976) 560 leaders were trained; only 4% were against this society-orientated practice before the course; and 2% were still against it after having experienced it.

Regional variations

I had the chance of taking part in a course run by one team, and of talking to team leaders from 3 other regions as well. It became clear that within the programme there are variations in approach and 'style' of operation within the broad guidelines.

Methods vary from one regional team, which uses formal lectures from many outside experts, to another team which models its training, in part, on group dynamic methods. The majority of team leaders I spoke to seemed to find a reasonable balance and variety of methods. I was interested to see how the need for regional and individual variations could be met whilst maintaining a general standard of training and of course the achievement of the 'PLUS' programme objectives.

THE REGIONAL SCHOOL LEADER EDUCATION PROGRAMMES

School Leader Training 1979/80: South East Area

This area covers four counties (Lan) - Östergotland, Kalmar, Växjö and Jönköping.

The Training Team

The leader is Nils Lagervall, head of a grundskola in Mjölby, but seconded full-time. He is also a leading member (vice-chairman) of

the School Leaders' Association in Sweden. Other trainers include:

a social psychologist/research worker
a county inspector from Jonköping
a county inspector from Kalmar
a kommun educational psychologist

Local school directors present also assisted with the training, especially during the home periods.

Participants were heads and deputies from grundskola and gymnasieskola in 4 kommuns (1 per Län); also politicans from Län and kommun level; and 4 kommun school directors. Three people from a specialist nursing branch of a training/gymnasieskola in Norrköping added an even greater variety. The average age of participants on this course was 52. Two people were near retirement and this contributed, in the view of the trainers, to a lower activity level.

Programme

I attended the sixth residential session (22-25 April 1980) - well on into the basic course. The course was based at a well-equipped small conference hotel. Work began on the Wednesday morning and finished on Friday afternoon.

This group had chosen to spend the fifth residential session on a study visit to Denmark. The trainers felt that this had distracted the group from the main purpose of the training, and they regretted the decision to accede to the wishes of the trainees. However, there were the makings of a good programme for residential session 6, even though the reports on Denmark gave the problem of an extra disconnected theme.

The programme for this session included:

Discussion of the visit to Denmark
The school leader's day
Conference/meeting organisation and the task of a chairman

There were some very competent formal talks by trainers, and a varied pattern of group discussion was used. The programme for residential period 7 was planned as part of a training exercise in the organisation and control of meetings.

The following working patterns were used:

'Family Group' - a heterogeneous discussion group of 6-8 school leaders from grundskola and gymnasieskola politicians and school director.

The family group stay together throughout the 2-year course and have the same trainer working with them (except where staff changes occur).

Interest Group - grundskola, gymnasieskola politicans and school director groups met separately in their own homogeneous groups to suggest ideas for the next residential course. The grundskola people also had a formal presentation on the local plan for their school which they have to prepare this Autumn as a continuing part of the implementation of the SIA proposals.

I discussed the basic approaches used by this group of trainers. They explained how each school leader prepares a contract during the first long home period between the first and second residential periods which he undertakes to observe and collect information on his own school. The contract goes to the trainers and to the county board. The school leader chooses his own area of study at this stage and he identifies problems but not solutions. Two weeks before the second residential session he provides documentation which is used in group discussions. In the third residential course the documents are discussed further in the family groups. Through all the residential sessions the trainers are building up the knowledge of the participants through formal presentations and group exercises etc. The school leaders each prepare a task to be undertaken in their own school in the short periods between residential sessions 3 and 4. In the long home period between residential session 4 and 5 the school leaders begin to implement an action programme in their own schools. (From this it is easy to see how the Danish visit 'deflected' the training for this particular group.)

I felt that this group were a little too kind to each other. The school leader's day had been discussed in family groups whose members compared their own assessments of their diary analysis, undertaken during a home period. A further problem had clearly been created for some people who had not had time to do their 'homework'. Others had not provided documentation in advance. In contrast, several people were already tackling problems in their schools. In one case a serious problem of staff communications was being dealt with locally with the help of a local education psychologist.

This training team was making effective use of education research findings as an aid to training. Course members discussed the role

of the head and were introduced to the problems of a school head as recorded in a recent piece of research - ie "absence of work routines, the working role not precise, insufficient information, cross pressures, eg teachers Vs school board, difficulties in getting co-operation of the school board."

These trainees had undertaken their society-orientated practice and I felt that some had chosen well, others badly. I was told this depended on the guidance given to heads in their own kommun. The key to success is proper and guided preparation during home periods and this is where a participant can lose out if he pleads 'shortage of time' or just rushes his preparation prior to a residential session. The politicians on the course participated well and clearly enjoyed it. The object of including them is to establish understanding and co-operation between politicians and heads in a community. I wondered, however, whether their presence only complicated the task of the trainers by bringing in another interest group.

Course planning is done by a county training committee for each region. There are difficulties in getting trainers of varying backgrounds and experience working together. 'Status' may affect the ability of a team to be 'free and frank' in discussion, eg the county inspector has a traditional role of some considerable status. This team had few problems and worked well together, even though one man preferred a formal lecture approach and another was all for group work techniques.

School Leader Training: Uppsala Area

I had a discussion with Jan Heimer, team leader, who is seconded full-time and is head of a grundskola. His training team has a head on half-time secondment and 2 educational psychologists (1 half-time and 1 two-fifths).

The emphasis in this area has been on "group dynamics". Some problems have been experienced because of the compulsory nature of the course. The team leader has completed a "Tavistock" course, but does not use their 'Tavvy' intensity of group dynamics.

The main emphasis in this area is on effective completion of home assignments. The team leader meets participants in groups of 2 or 3 (a logistic problem in a widespread geographical area). In some cases other school staff (in one case a school cleaner) are involved in discussion.

The first residential session is strongly directed by the trainers. Increased student participation and programme flexibility come into play from then on. The emphasis is on the school leader's role as an agent of change. Courses in this area were originally structured like a 'school timetable', but they are now more flexible.

This training team puts a lot of emphasis on working with large groups - heads often have to work with large groups. Teachers are afraid of large groups - they know what forces exist in them!

This team value the participation of politicans. "They ask the naive question which makes the group think!" (Heimer).

School Leader Training: Stockholm Area

I had discussions with the team leader who is deputy director of schools in Stockholm and with a county inspector, a head who is a trainer and some heads who have done the Stockholm course. The training team also includes an educational psychologist. Three teacher union representatives also participate each year and are given a course evaluation role.

Stockholm had some of the early courses and one head remembers an early 'pilot' experiment where an unnannounced 'sensitivity' training session provoked a hostile reception! There is a large tradition of local meetings for heads, both at kommun and county level, and this clearly provides a good follow up and support structure for courses.

The course has been well received by heads, but many people felt that it could put more emphasis on administration, organisation and a study of participation legislation (MBL). They consider the human relations content as important, but would like to see a better balance. Heads welcome the basic emphasis on school development.

In this area heads have a pre-course meeting and also meet together to plan home assignments.

Evaluation is undertaken by a 'reference group' of school leaders association and teacher association members and by an MBL group of union representatives.' The groups decide the geographical areas to be covered each year and make recommendations on course content.

In Stockholm kommun discussion groups meet to follow up ideas and projects arising from the course.

One county inspector values the course but states that "Too much stress is put on attitude changes and psychology."

It was pointed out that there could be a danger of a course planned in 1975 failing to adapt to changing needs. The programme ends in 1985 and there could be problems if "the only unchanging people are the trainers".

I was impressed by the way in which one head had used his society-orientated practice to good effect. He is head of a gymnasieskol with 600 students from 30 nationalities. His society practice was:

(a) In the local planning office - from this he has developed curricular studies on the local environment;

(b) At the Immigrant Office - creating personal links with staff able to advise and help with problems in his school;

(c) In the office of the National Sports Council; and

(d) At a local firm (Alfa-Laval) where links have been developed for school visits.

School Leader Training - Västern/Jamtland

This area covers two counties and stretches over a wide geographical area in the middle of Sweden, from the Norwegian border to the coast.

The team leader, Lennart Carlsson, is a county inspector who is seconded full-time. He has a team of two educational psychologists and one deputy school director - all on half-time secondment. The team leader has worked in this area for many years also as an inspector. He is well known: "Heads know the way I like to work". The educational psychologists find it hard to establish credibility because of their lack of teaching experience, but they are good trainers in the view of the team leader who was able to choose his own training team.

There is some difficulty in getting round this area to see heads in their schools. The team leader likes his psychologist colleagues to be accompanied by a team member who is an ex-head (ie himself or the deputy school director) and visits make great demands on the time of the trainers.

The team leader is currently tackling a problem in a kommun which has been highlighted by the course. A school director on the course is out of touch with his heads and the team leader has the task of helping him to improve performance.

I visited a headmaster area at Liden where the head and his deputies are actively and enthusiastically establishing a more democratic

leadership involving teaching and non-teaching staff. They were on the 1977/78 course and state that "People in the school are finding a new way of working together. More suggestions are coming from the staff, problems are better analysed."

A teacher at another school where the head attended the 1979/80 course had a different response: "The head is now much nicer, but he has still not tackled the major problems in the school."

TRAINING THE TRAINERS FOR THE SCHOOL LEADER PROGRAMME

This programme was implemented rapidly and many trainers were recruited 'off the street' (in the view of one team leader!) initially. Most teams tried to find experienced headteachers and 'people interested in development work', and with 'practical experience of it!' Some team members are there because of their normal role, eg the county inspector. A large number of educational psychologists have been recruited. Generally the teams contain a reasonable balance of experience, although it is obvious that there is a shortage of experienced trainers. The Swedish programme has benefited because full-time secondment has been given to team leaders and part-time secondment to the training team members. There has been a conscious effort to recruit the best practitioners from the field.

Because of the scope of the programme and the ambitious aims of the SIA programme, it has been necessary to provide regular training and discussion opportunities for trainers. Team leaders have ample opportunity to exchange ideas, but some 'rank and file' trainers told me that they would benefit from more training (there is a total of approximately 50 trainers).

VAGLEDARSEMINARIUM (Way-leading Seminars) were provided for each training team during the first two years of the 'SLUG' programme. Each team had a total of 3 weeks of workshops during that two-year period. In the intervening periods the director team get on with their tasks as tutors. In these seminars course documents are explained and teams of tutors have an opportunity of undertaking analysis of their own role as tutors.

UTBILDARUTBILDNING (Educator Education): From 1978 there has been at least one 3-day course per year on methodology, eg how to train school leaders in interview techniques; also how to behave as a group developer and how to handle the problem of evaluation.

LAGLEDARKONFERENS (Team Leader Conferences): Team leaders are given 12 days of training every year in three parts. Not only do they discuss practical methods, they also spend half the time on a training/demonstration residential one-week session where they practise various skills.

The training teams benefit immensely from the back-up service provided by the school directing team in Linköping who provide training, documentation, evaluation and a continuing link with research in the field of leader training and school development.

EVALUATION OF INSET PROGRAMMES IN SWEDEN

General

Evaluation has been actively pursued in Sweden. Careful analysis and evaluation is characteristic of the Swedish approach and the SIA Commission envisaged evaluation of programmes at all levels throughout the implementation of the SIA school reforms.

The National Audit Board (RRV) had undertaken a considerable amount of 'product' assessment - looking at goal achievement, cost and efficiency. In the late 1960s it found good results in two key programmes on teaching of English (JET) and new mathematics (DELTA), where it was possible to find quantifiable results. Great problems were experienced by RRV in assessment of the SOS programme which dealt with less early quantifiable issues, ie student activity in class and co-operation between pupils.

In more recent years there has been a shift towards more participatory evaluation of INSET programmes. In addition to 'product assessment', attempts have been made to evaluate a course for its contribution within an overall school development programme. More group evaluations have been undertaken in the field and course participants have been helped to develop evaluation techniques in order to enable them to participate more positively in course planning.

The most generous form of Swedish INSET - the 5 compulsory study days - has been evaluated by questionnaire, as have the summer courses organised by the Board of Education. In these studies some important findings have emerged - not least the discovery that many study days have been used as detailed start-of-term planning seminars. In the case of summer course programmes it was also noted that it was difficult to decide 3½ years after a course, which changes are a result of training and which arise from other stronger influences.

Evaluation of the School Leader Education

The team at Linköping have maintained a close personal contact with the programme. The steering committee comprising representatives of the National Board of Education Counties (Lan) Kommunerand teacher associations, meets 3 or 4 times a year. The Linköping programme directors visit training teams and residential course sessions and also keep in close touch with school leaders through various research and evaluation programmes. For example, three researchers, under the direction of Mats Ekholm, have undertaken a study in 3 headmaster areas whose school leaders took part in training courses in 1977/78 (2 areas) and 1978/79 (1 area). They will follow up in these 3 areas in 1981/82 to see what traces of change and innovation they find in the schools and the reasons for these changes.

The 'PLAG' programme has been evaluated also, and there is close liaison between the evaluation of the 'SLUG' and 'PLAG' programmes. Similar methods have been evolved. Some major evaluation exercises which have been undertaken are outlined below.

Survey of First and Second Generations of School Leaders Course Participants (1976/77 and 1977/78)

This evaluation was undertaken with the help of a very detailed questionnaire. Full results have been published this year.

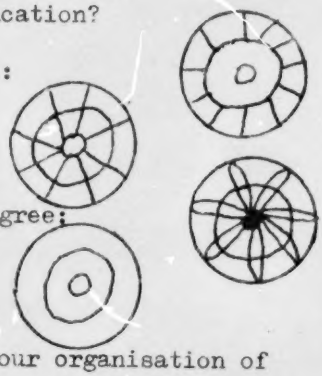
The evaluator, Glen Hultman, prepared thoroughly for the exercise. He travelled widely to see school leaders at work, see courses in action and talk to trainers. He analysed the documents produced by the school leader education team and identified 11 general principles of the course which he agreed with the trainers. He also read widely including studies from the USA and Canada.

The questionnaire was completed by 506 out of a possible 670 school leaders. The findings conclude generally that the training has had limited success in achieving the 11 general principles, but has had a good impact on the personal development of school leaders. Examples of detailed findings are outlined below.

It was clear from replies that the impact of the course on leaders themselves was claimed to be high, eg this is shown in the analysis of answers to Questions 54 and 57, as follows:

Notes from Evaluation Questionnaire to 506 School Leaders Active in the Programme 1977 and 1978

Question 54. In what way were you influenced by the education?



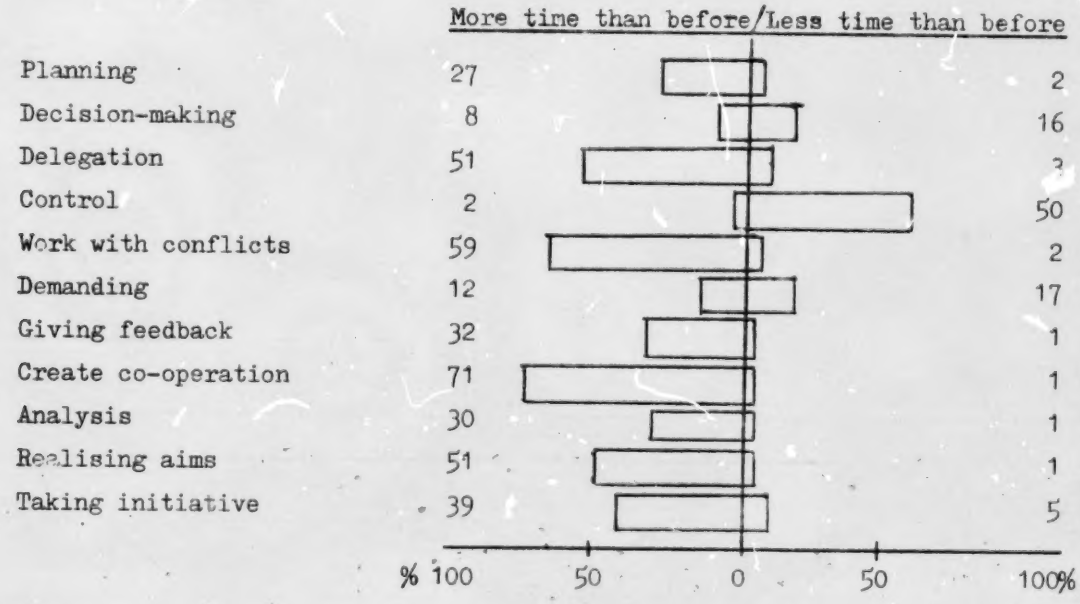
I have to some degree changed my attitudes: 24%

I have also changed my pattern of work: 41%

My whole personality has been affected. Even my self-esteem has changed to some degree: 22%

I have not changed: 11%

Question 57. In what way has the education influenced your organisation of of your working time?


More time than before/Less time than before
Planning 27 2
Decision-making 8 16
Delegation 51 3
Control 2 50
Work with conflicts 59 2
Demanding 12 17
Giving feedback 32 1
Create co-operation 71 1
Analysis 30 1
Realising aims 51 1
Taking initiative 39 5
% 100 50 0 50 100%

The questionnaire attempted to elicit comments on the training programme and its effects. The validity of the results can be questioned because self-declarations can over-estimate changes and are highly subjective. There were questions on perceived change and development process in the school leader's own school. Only 26% said that no change had taken place; 22% said that the school climate was more open to new ideas; 16% noted an increase in democratic participation; and 8% claimed an influence on the education process.

It was interesting to note that more work was done and more in-school results achieved where discussions in home periods with trainers were "about serious problems and seeking solutions". Where the trainers' contribution was more like a chat there was less impact. This underlines the vital role of the trainer in guiding 'homework'.

The 11 principles claimed as crucial features of the course and identified by Hultman were:

1. Participation by trainees in the decision-making process on the course.
2. Co-operation with school leader colleagues in the school and in the kommun, and co-operation with teachers in the school.
3. Exchange of experiences between school leaders.
4. Sufficient time given to home period work.
5. Variety and active work forms during the course.
6. Studies of his own school by each school leader.
7. Contacts with society.
8. The development of problem-solving attitudes.
9. A proper 'match' between course sessions and home periods.
10. Contacts with the training team.
11. Ability to give and take criticism.

Full results are soon to be published, and some interesting examples of the findings are outlined below:

- School leaders did not spend 4 hours a week on home periods. (The average was 2.16 hours. This reflects pressures on school leaders - a point made by many of the school leaders I visited.)
- There was little evidence of leaders undertaking full studies of their own school.
- 'SIP' - contacts with society had not led to pupil involvement in the community or the work place.
- There was good contact with trainers, but not enough pressure from trainers to encourage participants to work harder in home sessions and tackle major problems.
- There was not much sign of the giving and taking of criticism.

These results must not be taken out of context and the full study needs to be carefully considered when it is published. Training teams will use the results for their area to analyse their own performance. Glen Hultman is now planning a follow-up involving more school leaders who have completed the courses.

School Leaders Letters

Before the start of the course each school leader writes himself a letter, using set headings on the theme of what he wants from the course. He writes himself a reply two years later at the end of the course. This approach provides another vehicle for evaluation. With these letters and the questionnaires, the trainers have two complementary evaluation tools which make it possible to see what information has been retained by the participants and to learn more of the participant's understanding and perception of the course.

PREPARATION AND EVALUATION UNDERTAKEN BY REGIONAL TEAMS

Teams are encouraged to plan carefully and to evaluate the effectiveness of their training programme. I include at Appendix A an example of the questions asked of the teams and a particular response prepared by the team serving the South East area.

The most difficult evaluation problem is to determine what the effect of INSET is on the direct work of the school, and to identify any effect on what the pupils learn. This training programme and the team training programme ('PLAG') have the aim of contributing to the development of the local school. The Linköping team believe that the development process works slowly and that only after 5 years is it possible to see the effects of an 'implanted innovation'. Seventy-five schools/who will be participating in the 'PLAG' and 'SLUG' programmes have been invited to participate in a long-term evaluation starting this year (1980). Forty-five schools (ie all the staff, and not just the head) have agreed to take part to date. The evaluation will look at many aspects of the school, including the decision-making process, working arrangements and routines, communications, the way in which pupils and staff relate, sub-groups, power centres, etc. The procedure will be as follows:

In 1980: Two evaluations from the school support system will visit a school for 3-4 days in order to compile a picture of the school in all its aspects. They will use group and individual interviews and observation. Prior to their visit the head will have completed a very detailed questionnaire. Their report will then be locked away.

In 1982: The same process will be repeated and the report locked away.

In 1985: The evaluators will return and will make an assessment of changes made. Discussions will be held at the school and a

joint, final report will be agreed. This procedure is like the "condensed fieldwork" developed by Walker (1974 - University of East Anglia), but there is one important difference - no feedback will be given to the school until 1985 in order not to intervene unduly in the process of development of the training of the school leaders who will be compiling their own analysis of the school.

Appendix B is a recent note on the latest developments in evaluation of the programme, written by Sven-Eric Henricson.

I noted some irritation 'down the line' Local trainers are eager for more instant feedback and see limited value in long-term exercises. However, this is an attempt to identify the longer term effects of training. In the meantime two training teams have assessed each other's courses as another method of evaluation.

In Sweden trainers and evaluators are conscious of the problems and are making determined efforts to improve evaluation. There are problems because in the past they have not known the 'pre-training courses' state of the school. Nor can they be sure that the teaching staff in a school share the school leader's perception of changes made. The longer term study is designed to help illuminate these evaluation problems.

I am a little sceptical about this approach. The influence of factors other than training - not least staff changes - is bound to distort the picture considerably. However, the Swedish team have a good deal of experience of evaluation techniques and are aware of these possible limitations.

My own discussions with course participants tended to support the idea that school development takes time and that course results do not show immediately. Some examples are:

A. A head in Norrköping who attended the 1977/78 course but did not make changes until 1979. He had previously attended administration-based courses which in his view "dealt with some of the desk problems but not leadership - working with teachers". He had inherited a team with low morale, a school in a difficult area (800 pupils), social problems (including 30 different immigrant groups) and a shortage of qualified staff. The trainers assumed he had gained little from the course, but he claims that as a result of it he has been able to devise a new 'responsibility-sharing' staff structure, involving 11 teams of teachers in staff deployment and budget issues.

B. A teacher in Uppsala who was on the 'PLAG' programme has been given a free heand by his head to develop staff training. The head had done the school leader training and it is claimed, as a result, began to give more responsibility to this enterprising teacher.

Others gave a more qualified view of the value of the training.

C. A deputy head near Linköping who is on the 1980/81 course seemed to have a hazy idea of its objectives and is already unable to complete his home assignment. He is in the first year of a new job and pleads shortage of time.

D. The school leader team at a gymnasieskole in Mjöllby and others from two counties who attended the SE area course in 1978/79 made the following observations:

Residential Sessions

Success depends on the 'Family Groups' - problems are encountered if there are heads there 'under protest' - this was the case in one group.

Groups were too small (6-8). (This has been changed for subsequent courses, ie 4 X 9-11 people, instead of 6 X 6-8).

There was a general feeling that more emphasis could have been put on practical administration, law and budget problems that kommuns had undertaken to cover this side of the training, but many did not do so.

THE TEAM TRAINING PROGRAMME ('PLAG')

I visited one of the six regional inset centres at Uppsala. Since 1977 (when initial teacher training went to the National Higher Education Board) their INSET departments have worked to the National Board of Education in Stockholm.

The overlap of areas between 'SLUG' and 'PLAG' programmes was an obvious problem. Three 'SLUG' areas overlapped this 'PLAG' area and there was also a 'mismatch' on timing - the school leader programme having begun prior to the implementation of the SIA proposals! The counties of Orebo, Kopparbergs-Gävleborg have almost completed the school leader training programme.

The team training programme is offered to staff in a headmaster area. There is emphasis on an analysis of the real situation in the school, as in the school leader training programme.

The 'PLAG' training - 10 days over a year was reduced from a proposed 20-day course because of teacher association pressure to have the course in term time only.

The course has to be planned in consultation with six county in-service training boards and this creates problems.

I have details of the course and its evaluation; suffice it to say that ideally the school leader and team training programme should have been co-ordinated from the outset.

The team training, established under the SIA legislation, provides training for 1 school leader and between 10 and 15 teachers, non-teaching staff in the schools in a headmaster area. This team is separate from the 'SLUG' team. 'SLUG' teams (based on groups of counties) and the 'PLAG' teams (based on 6 INSET areas - covering two to six counties and based at a college of education) found co-ordination difficult. Some counties had also undertaken pilot school leader courses before the legislation was passed, and the timing training was not co-ordinated either. Another problem arose because the county inspector link was different for the two programmes. The main problem, however, was that the teachers' unions were opposed to the co-ordination of the two programmes and thus no co-ordination could be reached. It was only in 1980 that a merger was being considered because of economic problems.

The team training programme has as its aim an opportunity for all school staff to discuss the SIA reforms, to find methods and means of starting local discussions and how to get local development going via existing study days and as 'an integral part of the daily life of the school'.

The course was planned to last for 20 days (5 X 4 days) but in fact provides 10 days of training - 5 days residential course in the autumn term, 3 residential days in the spring, and 2 local days.

Ten to fifteen participants are brought together from a headmaster area. These include school leaders (head and/or deputy), teachers, school psychologists, education guidance personnel, pre-school teachers, leisure-time workers, janitors, office staff - indeed, all categories of personnel.

There are 1,200 headmaster districts, ie 15,000 people need training; 130 teams (2,000 people) are to be trained each year in a 7/8 year cycle which began in 1977/78.

The guidelines for training are very general and give room for local variations.

RECRUITMENT AND SELECTION OF SCHOOL LEADERS

Few people seem to be interested in obtaining jobs as head or deputy. There have been several attempts to analyse the causes of this and the reasons given in an enquiry undertaken by the school leaders' association (SFL) noted the following deterrents;

(a) The task of leadership is now much more complex. There are pressures brought about by MBL (legislation for employee participation); parental pressures; children and their social backgrounds are more difficult and resource problems add to the head's difficulties.

(b) There are a number of ways in which heads have comparatively less attractive conditions of service than teachers; salary differentials are narrower, they have shorter holidays and longer working days. (However, it must be noted that the recent introduction of a 40-hour week for heads with 'time off in lieu' or extra payment of overtime, has not improved recruitment.) Again, heads used to teach between 4 and 12 hours, but the basic requirement is now 4 hours for all, and this can be blocked.

(c) Teachers have less concern for hierarchy and as in other countries, the status of the head has changed.

Only 9 per cent of headships are held by women.

Attempts to improve recruitment

Attempts are being made to attract more women into headships. Stockholm County has had considerable success. The county inspectorate have positively sought out good potential women heads and 34 per cent of headships in the County population of 1½ million are held by women.

Study circles that present the job of school leadership to interested teachers have brought some success. There is a latent interest in headship and in a study course in Stockholm the organisers had 300 applications for 30 places on the course. In Stockholm administration courses for teachers have also proved popular. There is evidence that special recruitment attempts do widen the field of applications.

What the selectors look for

As in other countries, the emphasis is on teaching experience and not on qualifications. The former Social Democrat government wanted to attract others also, eg educational psychologists, but the idea was dropped because of teacher opposition. Some educational psychologists have been appointed, but they have to be of a very good calibre, and like all applicants , they need qualifications to teach in the type of school concerned.

Within the grundskola the head (who is head of his headmaster district) will have 1 or 2 deputies. In the upper secondary school there may be as many as 6 deputies. Teachers can begin to seek promotion by standing in temporarily for a deputy, but there is no career ladder available.

Why select?

There is a debate on the possibility of devolving selection to the schools and improving techniques. One of my contacts, a county inspector, holds the view that "You cannot tell who will be best however careful the interview or the number of people" (Stages in Selection", Hjorth Åkerman), because people grow in the job. This is where a 'ladder' of promotion opportunities may help to develop the potential heads. It may be a matter of "heads needing the courage to be heads". In contrast, another county inspector - Lars Elam of Östergötland - has devised a careful and detailed plan for local schools to have more freedom in staff selection. Selection of deputy heads is often in the hands of heads, although approval has to go through various levels.

Selection procedures

Jobs are advertised in the state newspaper (established 1642!). Advertisement details are minimal to save cost and written further particulars are not always available. Applicants may phone in to the local (kommun) school director to whom applications are sent. Application forms are not always used.

APPOINTMENT OF SCHOOL LEADERS AND TEACHERS

	Inspectors of the County School Boards	Local Chief Education Officers (School Directors)	Heads	Deputy Heads	Teachers: Comprehensive	Teachers: Upper Secondary
Local school authority	-	R	R	R	R	R
County school board	R	R	R	AR[1]	A[2]	A[2]
National Board of Education	R	R	A	A[1]		
Ministry of Education	A	A				

Key: R = Ranking of applicants

A = Appointment

1) = Deputy Head in the upper secondary school

2) = Only for permanent appointments; other appointments by the local school authority.

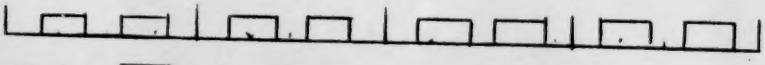
This whole structure will change when the National Committee, which is considering devolution of school management, reports later this year. The teachers may be appointed by the local school authorities; heads and deputy heads by the county school boards. Ministry and National Board of Education would not then be involved in detailed appointments.

At kommun level the local politicians are involved in selection. Teachers' organisations will also be involved.

FUTURE DEVELOPMENTS

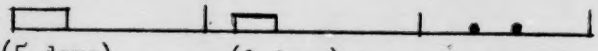
Since the summer of 1980 the National Board of Education and the leaders of the 'SLUG' and 'PLAG' programmes have been reviewing the present pattern of courses. This review has been stimulated by a search by the Ministry for economies in the education budget.

The present course patterns are as follows:



'SLUG'

Each ▭ is 3/4 days



'PLAG'

(5 days) (3 days) 2 local (usually non-residential) days

Key: ▭ = residential session

—— = home periods

⌴ = one semester or 6 months

Various possibilities for co-ordination of the two programmes have been considered. The organisational co-ordination of the two programmes will, from 1981 on, be of much less interest as the administration and other conditions for INSET will be very much changed as a result of the work of the Commission on the State School Administration, as well as of the cuts in the INSET budget. The 'SLUG' programme will still remain under the responsibility of the National Board and the reorganisation of the programme will mainly affect the training time (course time and the society-orientated practising period) and the number of trainers/educators involved. Part of the home periods of the 'SLUG' programme will be more directed towards local development, thus supporting the 'PLAG' programme as described in the following.

The 'PLAG' programme will be a responsibility of the local school authorities and the local headmaster districts/schools. There will be no residential course periods and the whole programme will be a part of the local development programmes, including the local study days. For example, in the Uppsala area in 1981 the 'PLAG' programme is to be completely reorganised. The budget has been cut by 40% and instead of 10 to 15 people being trained away from school for 10 days, it is likely that all the people in a headmaster area will be trained during the 5 compulsory INSET days, or in holidays. The programme will be even more school-focused, and is to be given a new title 'In-Service Training for Local Development in the Comprehensive School'. The County School Boards will distribute money for the programme to the local authorities according to general rules set up by the National Board to guarantee economic support to those headmaster districts which have not yet passed the training.

CONCLUSION

It would be unfair to attempt an evaluation of the Swedish school leader education programme on the basis of a three-week visit. My purpose was to gather experience for consideration of headteacher training provision in the UK.

It was refreshing to observe a training programme which was planned as part of a national policy thrust to influence "the inner workings of the school". Change cannot be created 'by decree', but at least a framework has been provided together with the necessary funds.

There are major problems which the Swedish authorities are well aware of. For example, the major INSETT resource - 5 days training per year for each teacher is still not fully 'mobilised'.

A basic weakness in school leader education has been the patchy response of local authorities; the administrative training they should have provided is missing in several areas.

The emphasis of the school leader education programme is to create developments and improvements in schools. This aim seems absolutely right, although the directing team at Linköping recognise the difficulty in achieving it. Trying to create change 'from the top down' through a compulsory programme is difficult, unless the school leader and other teachers in a school respond to that challenge. Some people 'play along' with the programme and avoid the real problems; others are overwhelmed by work pressures, but a significant number do achieve real changes. Success is more likely when the school leader learns early in the training course the skills of managing his own time. The success of the course is also

dependant on the skill of the trainer and his ability to analyse problems at school level and offer a real challenge to the school leader.

The Swedish school leader programme is the most ambitious in Europe. It has much to teach us. A great deal of evaluation is taking place and much of its success is due to the ability of the trainers to be self-critical and their willingness to take criticism in the search for greater effectiveness.

I am grateful to all the people who arranged my visit to Sweden especially the team at Linköping and their 'trainer' colleagues. The people I visited included:

National Board of Education

Mr S E Henricson

School Leader Education, Linköping

Eskil Stegö
Mats Ekholm
Björn Sandström

Department of Education, University of Linköping

Glen Hultman

School Leader Training Programme

Nils Lagervall
Jan Heimer
Lennart Carlsson
Torild Bornetun
Börje Kallerdahl

'PLAG' Team Training Programme

Kirsten Karlsson and Mats Barrdahl, Uppsala
Tomy Carlberg, Linköping
'PLAG' trainee - Jan Lundqvist, Vasätra (Uppsala)

School Leaders Association

Olov Hammarland, Chairman

Stockholm County Board

Ingeborg Hjorth-Akerman

Schools: Headteachers

Kirsten Persson, Kunghögaskolan, Mjölby
Curt Lagergren, Norra Reals Gymnasium, Stockholm
Roland Del'alk, Norrköping
Steffan Brisfors, Deputy Head, Vikingstad, Linköping

Stockholm Kommun

Anna Greta Forsberg, Deputy Chief School Director

1981-01-12

I. The Targets of Leader Education

(1) Describe the five most important objectives of your team's training program:

(2) Go back to the list of five above and rank order them from 1-5 according to their priority for your team:

(3) Please explain in a few paragraphs the philosophical or theoretical rationals that undergirds the objectives:

(4) Brainstorm a few concrete behaviour that you would look for in the school leaders that would prove to your team that your objectives were being reached:

II. The strategy of Leader Education

(5) Present an overview of your team's strategy showing the sequence of training events occuring over the two year period:

(6) In particular, summarize your team's course design and content:

(7) Summarize what sort of things your team does to facilitate the home experiences of the leaders:

(8) Summarize what sorts of practical experiences that the leaders working with your team have had:

III. An Analysis of Leader Education

(9) List at least 5 factors that you think facilitate the effectiveness of your team's strategy in reaching the targets:

(10) List at least 5 factors that you think hindra inhibit the effectiveness of your team's strategy in reaching the targets:

oförmågan att ta bil "hemma"
förändringsvilja
bristande mål insikt
Oförmågan att "lyssna på varandra"
Lätt samarbete i arbetslag
" " i arbetslag ledning - personal
" " " " personal - elever

(11) Indicate any tactics your team has tried to reduce the strength of the inhibiting factors:

(12) Summarize ways in which your team's strategy has changed over the years:

I. The Targets of Leader Education

(1) Describe the five most important objectives of your team's training program:

The main objective of the education is of course to make the work in school more meaningfull for the pupils. We her describe some of the underlying objectives to reach this goal.

Role-related objectives

* A more conscious and systematic planning of the working-time
* An increased willingness to deal with the realtions between personel on the school
* An increased understanding of the possibilities and limits of the organization

Organizational-related objectives

* More initiatives from the schoolleader to deal with a democratic development of the organization
* More knowledge of and an increased willingnes to deal with the objectives of the school as they are formulated by central authorities.

(2) Go back to the list of five above and rank order them from 1-5 according to their priority for your team:

1. More knowledge of and an increased willingness to deal with the objectives of the school as they are formulated by central authorities
2. More initiatives from the schoolleader to deal with a democratic development of the organization
3. An increased understanding of the possibilities and limits of the organization
4. A more conscious and systematic planning of the working-time
5. An increased willingness to deal with the relations between personel on the school

(3) Please explain in a few paragraphs the philosophical or theoretical rationals that undergirds the objectives:

It is important that the schoolleaders are given possibilities to meet educational situations that are meaningfull to them and their work on the school. This is important for at least two reasons: it is necessary in order to motivate the schoolleaders for the work during especially the home-periods, and - secondly - because these situations could serve as models for the pupils'schoolsituation. The work during the education could - in that way - be an incitament to reflections over the relation between education and learning.

Bruner points out the difference between the three levels in which knowledge is transmitted: symbolic level, illustration level, and action level (my translation of the terms). In the education we try to stress the action level - both during home-periods and course-periods - as we believe that most work in school, by tradition, is on the symbolic level and illustration level.

We further think that quite a lot of the content during the education is of the sort that the most natural way to deal with it would be on the concrete action level.

(4) Brainstorm a few concrete behaviour that you would look for in the school leaders that would prove to your team that the objectives were being reached:

* To what extent is the staff involved in the work together with the leaders in their education
* What kind of "project" do the schoolleaders work with? Does it seem to be a coulisse rather than a realistic description of the real situation
* What can we see during our visits at the school?

II. The Strategy of Leader Education

(5) Present an overview of your team's strategy showing the sequence of training events occuring over the two year period:

The question is difficult to answer if you with "your team's strategy" mean a sequence of educational events that is the same from one year to another. This is not the case.

At the beginning of the education we now spend some time - approx. 3 days - during the first course-week to plan the education together with the participants. This planning is made in a quite structured way.

This is one way of trying to fullfill the objectives as they are stated in the curricula of the education concerning the participants involvement in the planning of the education in order to make the education more meaningfull to the school-leaders. This could also be seen as an educational event showing how a democratic descisionmaking-process could be brought about. One other result this way of planning the education will have is that, later on, very little time will be spent on explaining why we work with certain tasks.

During this planning we work through the frames of the education: economical, personal, and ideological frames. Here we try to "map out" the objectives of the education by going through the documents that govern our work. One of these frames describes a working-model and this model could be seen as the strategy in very broad terms. The working-model describes the steps in an exploring-process; observe, analyze, decide, act. These steps could be seen as "musts" during the education. Another "must" is that the working-model should be applied to the two areas that lies within the objectives of the education: the development of the school-leader function and the development of the organization.

The planning should result in a broad-term plan for the two-year period and a more detailed plan for the nearest future. The later would be more of deciding what areas that we would work with than how we should work. The question of how we should work must to a large extent be a problem for the educational team to solve.

(6) In particular, summarize your team's course design and content:

In relation to what was said under (5), we will here take one example of how the course-periods were designed for one course-group as far as this group has come in the education. We also add the content of the home-period work.

the development of the leader function	the development of the organization
course-period 2	
* Interviewing-technique * Questionaire-technique * How does human development occur? * How could I document collected information? * Time- and workplanning	* What are the objectives of the school?
home-period 2	
a) the own working-habits	b) the staff's view of certain areas of the organization
Collecting information of and documentation of collected information Society-practice	
course-period 3 and 4	
Analyzing the documents and priority given to developmental tasks under a) and b) above.	
* Evaluation of the school's total leader-competence	* Work with Blake and Mouton's "Managerial Grid"
home-period 3	
Work with the developmental tasks a) and b) * Further work with the total leader-competence of the school	
course-periods 5 and 6	
Work with the "pedagogical leadership": * How to deal with conflicts * "Managing by objectives"	* Decision-making and conferences * Supports and obstacles to the development of meaning-full classroom-work

(7) Summarize what sort of things your team does to facilitate the home experiences of the leaders:

When we did the long-term planning of the education together with the participants we tried first to plan the content of the home-periods and afterwards we worked with the course-periods. In this way we tried to use the course-periods as "support-stations", so to speak, for the home-periods.

That is why, for instance, interviewing-technique and questionaire-technique is delt with during the course-period that lies before the home-period where this kind of work will be done. If you look under (6) you will find other examlpes.

The visits during the home-periods are also ment to be facilitating for the tasks that the schoolleaders are working with.

We try to convince the participants of the necessity of establishing a forum for discussions on their own school concerning educational matters.

(8) Summarize what sort of practical experiences that the leaders working with your team have had:

Many of the practical experiences that the schoolleaders have had - beside the society practice - lies under the observing fase of the education. Examples would be: following one teacher for several days, following a collegue (on another school) for some days, being a pupil for some days. All these activities are ment to give a deeper understanding of life in school.

During the analyzing fase time is spent during course-periods to discuss and plan different ways of presenting and working through the document, that was a result of the observing fase, with the staff.

Preparation of the home-period during the decision fase could be that the decision-making process could be a topic for exploring at the own school.

(9) List at least 5 factors that you think facilitate the effectiveness of your team's strategy in reaching the targets:

* If the total number of schoolleaders from one community (kommun) enter the education at the sam time (a condition that is not possible for the larger communities).
* If the local superintendent of schools takes the education seriously and uses pressure to se that the schoolleaders plan their reduction in workingtime
* If there is - or we succeed to establish - a good climate for change in the course-group
* If the educational team succeeds to be a good model for leading an organization - if we succeed to do our best
* If we have active politicians in the course-group
* If we succeed to formulate clear agreements concerning the home-periods work
* If we succeed to make the connection between course-periods and home-periods clear

(10) List at least 5 factors that you think inhibit the effectiveness of your team's strategy in reaching the targets:

* Lack of agreement concerning pedagogical questions in the educational team
* Many schoolleaders unwillingness to change working routines and to plan and use the reduction in working-time for educational tasks
* Unwillingness (from the schoolleaders aswell as from the educators) to enter an honest and open-minded discussion
* Lack of cooperation among the educational team
  the schoolleader-group at the school
  the schoolleaders and their staff
* Inconsistency between ideas and action from the educational team
* The difficulty to arrange meaningfull visits during the home-periods

(11) Indicate any tactics your team has tried to reduce the strength of the inhibiting factors:

We have had several meetings within the educational team when we have discussed the philosophical aspects of the education. During these discussions we have tried to work out a common profile for the work together with the participants.

We also have had contacts with other teams to share experiencies and in one occation we had an observer at another team's course-period.

We have had contacts with other educations.

Some of the crucial problems we have tried to deal with in working-groups whose tasks have been to examine the situation and give suggestions of new ways of action.

We have spent more time together with the local superintendent of schools and the local politicians in order to make their role clear concerning the possibility to motivate the schoolleaders to arrange and use the reduction in working time as a resource for the education.

(12) Summarize ways in which your team's strategy has changed over the years:

There has been one major change in our team's strategy. At the beginning of the education we worked with a much more strict structure. That meant that we could even before the education for one course-group had started know almost in detail what the content of the different course-periods should be. The content of the education was during that time, if you strain the reasoning, more a result of what competences we at that moment thought we had within the educational team than a result of what the different course-groups thought they needed.

This has, of course, resulted in - at least in some respects - a decrease in quality but, as we hope, an increase in meaningfulness for the participants.

To put it as Winnie-the-Pooh would have put it:

"My English is wobbly! It's good English - but it wobbles!"

SKOLÖVERSTYRELSEN
NATIONAL SWEDISH BOARD OF EDUCATION
Sven-Eric Henricson

1980-10-10

THE EVALUATION OF THE SCHOOL MANAGEMENT TRAINING AND THE TEAM TRAINING PROJECTS IN SWEDEN

1 Introduction

The evaluation of the School Management Training (SMT) and the Team Training (TT) projects could be described as consisting of two main clusters of activities.

One is the continuous observation of what is going on in the dayly work in the projects (e g in course and conference time, during the Home Periods between the course sessions and in the Socially-oriented Practical Experience Periods). This evaluation is based on the experiences and assessments of participants, course and group leaders and those responsible for the administration and development of the projects. The general objective of this evaluation is to improve the training by continuous developments and changes of organization, content, working methods, material applied in the projects, including the training of the trainers.

The other part of the evaluation undertaking covers different kinds of studies on how and to what extent the two projects have an impact on schools/headmaster's districts. In this case we are dealing with long term effects on the school as an educational and social institution. Even if this aim covers the total situation and procedures in a school/headmaster's district it is certainly necessary to limit the evaluation to a few characteristics/variables, with special reference to the projects.

The evaluation activities of the two projects could also be described as a process evaluation, mainly formative with some few elements of summative nature.

For many reasons (content, aims and techniques) it is not always possible to separate the two types of evaluation as described above. Still in the following we will try to keep to the distinction and describe the evaluation of the projects under the headings of

a) Continuous evaluation of the training process

b) Long term effect studies.

Under each heading the two projects will be treated separately as far as possible.

Finally an important part of the follow up of the two training projects is the continuous cost analyses as a basis for the budgets as well as for changes in organization of the projects. These cost analyses, drawn up by the Working Committees, are regularly discussed in the Advisory Groups.

2 Continuous evaluation of the training process

2.1 School Management Training (SMT)

Data has been collected from three main sources, (1) the participants, (2) the trainers and (3) the Working Committee in charge of the project.

2.1.1 The participants

During Spring 1979 all those who had passed through the SMT from it's start to the end of 1978 (in all 670) were invited to answer a questionnaire on the training (see Appendices 1a and 1b). A final report has appeared in September 1980 (Glenn Hultman. USU-projektet: Uppföljning av skolledarutbildningen, delrapport. Follow-up of the School Management Training).

Another questionnaire was specifically designed for the Practical Experience Period and the problems involved in organizing this activity.

Another technique used in the continuous evaluation is "Write yourself a letter (see Appendix 2).

Finally, participants have given their observations and appraisals of the training in informal talks and discussions with the trainers and others in charge of the training.

2.1.2 The trainers

By continuous observations and discussions with participants and within the regional training team information on the training process is collected. This information is fed back to the training mainly in three different ways.

Some of the information results in immediate and direct changes of specific parts of the training process. In other cases the observations form the basis for a discussion with participants and the training team leading to changes in the training. When the observations touch upon principal matters they are referred for considerations to recurrent seminars, organized for the trainers as a part of their own training or to the Advisory Group before decisions are taken.

Members of the training team representing the Headmasters' Unions and of the Working Committee have also visited courses and other activities and given informal reports on the opinions of the participants as well as on their own experience.

2.1.3 The Working Committee

The members of the Working Committee are following the training through different informal channels, e g by the procedures described above in section 2.1.2. They also carry out more systematized studies of the training process. Some of these studies

have been devoted to the working methods of the leaders of the training teams and have been discussed with these leaders at training seminars. Other studies pertaining to the Home Periods have been discussed with the local school authorities, the training teams and participants. As an exampled of studies of this kind see Appendix 3.

2.1.4 Other studies

According to the 1976 decision of the Parliament on the suggestions of the SIA-Committee for reforming the 9-year Comprehensive School the SMT and TT projects can be looked upon as new ways and methods of using In-Service Training as support to local development and change. Consequently by follow-up studies of these projects, especially at local level after the training will give unique chances to study the natural process of changing the situation in a school/headmaster's district.

Out from these general presumptions a special study on the Innovational Process in the Comprehensive School (the INNOVA-project) was taken up at the University of Linköping. The study is a part of the R & D programme of the National Board of Education and founded by the Board.

Three headmaster's districts, which have taken part in SMT and TT, are followed by one researcher in each district. The researcher has no other tasks at the school than following the process. He collects data mostly in a socioanthropological way, but also by using surveys presented to both pupils and the staff. The researchers are in no way trying to influence the change process in the school. They just follow it, describe it and understand it, thus trying to trace the influence of the two projects on the change process.

This long term follow up study is designed to cover different stages of the process of changes, such as the stage of Preparation, Accomodation, Application, Circulation.

The working methods could briefly be described in the following way.

The characteristic of our methodology is social anthropological observations. During the time which we observe we are not participators in the school work. Our only function in the school is to observe what is going on. The aim of the observations is to understand and describe the ongoing process. Therefore we keep a diary of our experiences and observations. In our work to collect information we also use questionnaires linked with follow-up interviews. When we are at the school we are following the everyday-life, i e visiting classrooms, or follow a class the day through, meeting different teachers, having lunch sometimes together with staff sometimes with pupils. We also spend a lot of time in the staff's rest room. We just follow the lessons we are welcomed to visit. We have met different reactions to our presens, some teachers suffer from a slightly paranoic feeling that we are totally analyzing their work, others see us a stimulating event in their everyday life of school work.

We try to keep out of participating as far as possible. That means that we try not to discuss our observations with the teachers or the pupils. Acting in this way means that we many times are considered to be rather trying persons in the every-day life of the school.

In Spring 1979 we have spread a questionnaire to teachers and pupils. That is the first time everyone at our schools will get a hint of what we really are looking for. Afterwards we want to do some interviews, based on the information gathered.

In our work we try to understand the dimensions of atmosphere of cooperation, of willingness to change and also to understand the innermost of the working process of the school. We have also tried to measure variables which are crucial ones in the latest reforms of schoolwork in Sweden.

Our reporting is a matter of discussion at the moment. We think that the people at the schools probably will demand some feed back after we have analysed our questionnaires. However, if we meet that demand we would probably contribute to a start of a development process on the school. This is something we do not want to happen. Therefore we intend to keep our information "hidden" as long as possible. Reports of the study will be published after end of the field-study in about 1982.

2.2 Team Training (TT)

The continuous evaluation of TT follows the same general pattern as that for the SMT using the equivalent sources.

2.2.1 The participants

In Spring 1979 those who up till that time had finished the TT were invited to write a letter to the Working Committee giving their personal opinions regarding the training. Some prefered to do that individually, others answered as a team. 48 full teams and some tens of individual participants sent in such letters out of some 270 teams and a total of about 3 500 participants.

During Autumn 1979 and Winter 1980 two thirds of the teams (about 90) who up till the end of the academic year 1979/80 had taken part in TT were invited to answer a questionnaire of the same kind as that for the SMT. The final report is under preparation. A short summary is given in Appendix 4.

As in SMT participants have given their opinions in informal talks and discussions, mainly with trainers (course and group leaders).

2.2.2 The trainers

Three kinds of formal reports have been prepared. The group and course leaders have reported on their observations during the courses and the Home Periods between the courses. The same has

been done by the regional training teams and finally the group leaders (one member of the team) have reported on the local course period, the last two days of the course time (see App 5).

Informal talks and discussions with the course and group leaders as well as with members of the Working Committee have formed another channel used by the participants for giving their appraisals of the training.

2.2.3 The Working Committee

As in the SMT members of the Working Committee have collected observations on the training through discussions with participants and trainers. No specific studies of the kind mentioned above in section 2.1.3 have been carried out.

3 Long term effect studies

3.1 Introduction

Even at the preparatory stage long before the start of the projects as well as during the planning of the projects the evaluation of the long term effects was discussed. In these deliberations we tried to take into consideration both theoretical and practical consequences for a long term evaluation. For practical reasons, however, the continuous evaluation of the training process was our first concern. This was especially the case for the TT as this project had to start with considerably fewer preparatory measures compared to the SMT. We had to follow the course periods as close as possible, knowing that the selection, training and preparation of course and group leaders had to be organized and carried through at top speed. As the training developed we also deliberately aimed at using observations and experiences from the training as material in the training of the personnel in the training teams.

When preparing the questionnaire for the evaluation of the training process we found it natural to include questions on how the participants assessed the training in relation to their working situation in general and it's impact on the developments at school level (see Appendices 1a and 4).

From 1978 the two Working Committees entered into more specific and joint discussions on the long term evaluation, ending up in a draft for a special project. The draft was presented to the training teams and to the Advisory Groups and in January 1980 the plan for a project on long term effects was settled.

3.2 The plan for the long term effect evaluation project

3.2.1 General background

Some basic facts formed the basis for the project. In the first place, any evaluation of the impact of a training scheme aiming at furthering change and development of the situation in a school/headmaster's district must be extended over a rather long

period of time, at least five years. Secondly, some sort of description of the situation in a school/headmaster's district before the start of the training is needed to be able to observe any changes and developments at all. Finally it is indeed difficult to relate observations of changes and developments at the school level to a specific factor. The very fact that the two training projects are aiming at changes and developments in a very broad sense, covering the total school situation, does not make it easier to build up a strict correlation between what is going on in a school and what has happened during the training.

Starting from these ideas we resumed that we had to follow some schools/headmaster's districts over a long period by repeated studies comprising at least three stages:

a) A description of the situation in a school before the training, in the following called the Initial Position Study (IPS)

b) Studies aiming at mapping changes and developments taken place after the training. The Mapping Studies are planned to be undertaken two respectivly five years after the IPS. In these studies we are especially interested in factors, which may restrain or promote changes and developments at local level, e g support from regional or local school authorities.

c) Analyses of the Mapping Studies trying to refer observed changes and developments to the training.

By analyses of the aims and objectives of the two training projects we made up a list of areas of interest for the evaluation (see Appendix 6). These areas or variables formed the basis for the Initial Position Study. The variables were also chosen with respect to the following stages of the long term evaluation. By organizing the information on these variables into some main aspects, covering the aims of the training projects as well as main issues of local change and development we think it will be possible to observe changes from stage 1 to stage 2. Up till now these aspects or hypotheses can perhaps best be formulated as questions.

a) Do analyses of the general overall objectives for the compulsory school take place in a specific school/headmaster's district? (How is such work organized, who participates in this work?)

b) What problems do school leaders, teachers, other personnel, students, parents experience in the school?

c) How are these problems regarded in relation to the overall objectives of the compulsory school?

d) What measures have been taken, if any, to cope with the problems at school level? (Priorities, planning, difficulties, restraints, support etc.)

As questions or rather problems pertaining to questions of this kind are basic matters dealt with in the two training projects the categorization of the information from stage one and two in accordance with the same questions will facilitate the analyses in stage three.

All in all the long term evaluation project could be characterized as an attempt to make a systematic study of the process of local developments in a school/headmaster's district, including restraining and promoting factors. We think the latter circumstances are of importance, especially in trying to build up a support structure to local development of the school and for the development of the training projects as a kind of starting point for and support to local development.

3.2.2 The Initial Position Study

Taking economic and practical factors into consideration we decided to use a kind of semi-formalised interview technique as a means to get information covering the variables. Groups of two interviewers (evaluators), of whom at least one should have training and practical experience in the field of psychology/social sciences, should visit the selected schools/headmaster's districts for two to four days. During these days they should interview different groups (and individual representatives) of students and personnel of the school (see Appendix 4), trying to cover all variables in all groups, going into details on issues of which a certain group was supposed to be specially concerned or informed about.

As a background the interviewers had a short questionnaire answered by the headmaster, covering data on the school, e g number of students, especially immigrant students, number of teachers (with and without qualifications), teacher and student turnover, auxiliary personnel, Parent Associations and their activities, previous activities of development, R & D and local INSET, internal organization of management, conferences, student participation.

When starting the long term evaluation study in January 1980 for those schools/headmaster's districts, which entered the training during 1980 (SMT in January, TT in Autumn 1980), we had to decide on principles for the selection of schools. All types of schools (compulsory, secondary, adult education, labor market training) are taking part in the SMT. On the other hand the TT is only covering the 9-year compulsory school. As the two projects have very much in common, especially as far as aims and objectives are concerned, we decided that only headmaster's districts for the compulsory school should be involved in the project. Even with this restriction there remained about 200 headmaster's districts, far too many to be included in the study. Considering time and economy we found that a maximum of about 50 schools/headmaster's districts could take part in the project. Naturally we aimed at having this sample as representative as possible. In this respect we also had to take into account that

some of the headmaster's districts started out with SMT, others with TT and that some of them, going into one of the training projects in 1980, had already gone through the other one, one or two years ago.

A crucial issue connected with the matter of sampling was whether we could use a stratified sampling technique and just tell certain headmaster's districts that they had been chosen to take part in the project. Considering the research methods and other circumstances we came to the conclusion that the personnel in a headmaster's district should be invited to take part in the project and have their own choice whether they would take part or not.

Accordingly invitations were sent to about 45 headmaster's districts, starting SMT in the beginning of 1980, and about 20, starting TT in Autumn 1980. All in all 44 answered positively (28 SMT and 16 TT). Naturally this sample is not representative of the two populations (e g schools in big towns are underrepresented) even though we tryed to make the invited sample as representative as possible.

Finally we had to consider what kind of information or feed back, if any, should be given after the first part of the project. Keeping in mind that the first part should form a basis or starting-point for following studies we found it necessarry not to present the evaluators written reports on the first part of the investigation to the schools involved to avoid interference with the future parts of the project. On the other hand we also found it natural that the evaluators must be allowed to discuss the situation in a school if such matters were taken up by the personnel of the school.

3.2.3 Planning of the Mapping Studies

For the SMT we now have access to the evaluators' reports of the Initial Position Study from 28 headmaster's districts. At the end of this year we will have the same reports from 16 TT districts. We now have to review the experiences of the evaluators concerning practical problems as well as the availability of the variables as guidelines for the interviews. It is also possible to test the possibility to categorize the information from stage one along the four main areas mentioned in 3.2.2.

We also have to follow the 44 headmaster's districts during the training period to get additional information as a background to the Mapping Studies.

3.2.4 A special preparatory study of TT

In Spring 1980 12 headmaster's districts, which had gone through the TT by the end of the academic year 1978/79, were visited by evaluators, using the same techniques and variables as in IPS. The aims of the study are the same as for the long term study, taking a short cut compared to the long term study. Part from the information on the effects of the TT that we may get from this study one can look upon it as a preparatory study to stage 2 and 3 of the long term study. We certainly will use information and experience from this TT-study in the planning of the future stages of the long term evaluation (see Appendix 7).

4 The follow-up work at the regional level

The County School Boards are involved in regional planning and carrying out of SMT and TT. According to their instruction they also should follow the development of the school system in their regions. They also mainly through their INSET personnel act as a sort of support structure for local developments. Some County Boards have made systematic efforts to follow especially the TT at local level. Some of these experiences are already given in the reports from the regional training teams (see 2.2.2).

In the future stages of the long term evaluation it is therefore important to keep continuous in close contact with the regional training teams and the County Boards.

In some cases the regional training teams in TT have organized special regional evaluation projects in co-operation with research workers in universities. These projects are financed either by money from the training projects or by the R & D founds of the National Board of Education.

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